

Basic Training Checklist

REALTOR Association:

____What benefits your state association provides for you. Are your forms included in your dues? Any e-signature programs? What things do you have available that you can use?

____Your Code of Ethics training. You need to understand the rules of working with clients and other agents and make sure you understand how not to violate the rules

____RPR Login

____NRDS Number

____NAR Login

____State AR Login

____Local AR Login

MLS:

____How to search

____How to search using a map feature

____How to add listings into a cart

____How to email properties and set clients up on an auto search

____How to create a CMA

____Where market stat info is published and how often

____What status' of listings are available. Active, pending, expired, withdrawn, cancelled, etc and exactly what each one means

____How to read showing instructions and know whether there is a lockbox

____How to look up property history

____Tax records and how to look up square footage, year built, lot size, permits, ownership

____How to search tax records by owner name, address and radius if possible

____How to access lockboxes and does lockbox provider have website to log in to

____How to enter a new listing and what rules do you need to know about photos, remarks, etc

____How to change the status of your listings if they go under contract or need to withdraw

____How to change the price of your listings or update comments, etc

____How to update your MLS profile and add your photo and other info

Brokerage Training:

PROGRAMS/SOFTWARE:

- ____Forms
- ____E-Signatures
- ____Tax Record Database
- ____Intranet or Back End Website
- ____Transaction Management Software
- ____CRM
- ____Lead Platform (if available)
- ____Email Platform
- ____Marketing Platform (if available)
- ____Training Resources
- ____Company Facebook Group or Group App/Portal for Communicating
- ____Fax Number and How to Send/Receive Faxes
- ____Using the Printer and Scanner
- ____Door Lock/Key for All Available Office Locations
- ____Office Supplies and What to do if Out
- ____Tech Support, How to Contact and When Available

COMPANY PROTOCOL:

- ____Who Reviews Your Contracts?
- ____What's the Process for Reviewing Paperwork and Time Frame Requirements?
- ____Who Answers Your Client or Contract Questions?
- ____Who Reviews Your Marketing and Advertising? What is That Process?
- ____Is there a Transaction Coordinator available to Help You Gather and File Your Contract Paperwork? How Much Does that Cost and How Does it Get Paid? Is this Required?
- ____Are there Any Specific Company Forms (Escrow Cover Sheets or Client Engagement Forms) Required for Buyers or Sellers?
- ____Is there a Preferred Title Company? Preferred Lender? Are you Required to Use Them?
Is there an Incentive to Use Them?
- ____Is there a Company Meeting? How Often? Where? What Time? What Should You Do if You Can't Make It?

- ____Is there a Regular Company Listings Tour? When and Where and How Often? What Time Does it Start and End? Does Everyone Caravan or Go Separately? Is a Tour Sheet Available?
- ____Do you have Company Sales Minimums? What Are They if So?
- ____Are There Any Other Requirements to Remain on the Team?
- ____Is Floor Time Available? How Do You Sign Up? How Long Are the Shifts? What Training Will You Need Prior to Your First Shift? What Will Your Responsibilities Be During Your Shift? What Should You Do if You Can't Make it and Who Do You Notify?
- ____Do You Receive a Desk and Computer? Where is it? Is it for Your Exclusive Use or Shared?
- ____Where are the Printers and Your Mailbox Located? How Do You Send Outgoing Mail?
- ____What's the Protocol for Reserving a Conference Room to Meet Clients?
- ____Are there Community or Other Company Events that You Should Know About? Is Participation Required?
- ____What's the Protocol and Procedures for Hosting Open Houses for Other Agents in the Office? What Training is Required Before You are Allowed to Host One? Is Someone Available to Accompany You for Your First One?
- ____How Do You Get Listing Signs Up and Down? Who Pays for That?
- ____How Do You Get Business Cards? Is there a Photographer Recommendation for Your Headshot Photo?
- ____What is the Company Minimum Commission for Listings? What Types of Listings Are You Allowed to Take? Exclusive Right to Sell Only?
- ____Are Buyer Broker Agreements Required? Does the Company Have a Specific Form for Those?
- ____Are You Allowed to Perform Dual Agency? Are there Any Restrictions About That?
- ____Is there a Mentor that Can Help Me? Who is It (or Who Are They if More Than One) and Do They Charge for Their Help? How Much if So? What Would that Mentor Help Me With and For How Long?
- ____Who is My Main Trainer in the Company?
- ____What Does the Office Staff Help With and How Do I Best Ask for Their Help or Contact Them? What Hours Do They Work?
- ____Who Will Help Me Learn the Company Software/Resources? Are there Online Training Videos Available for Those Things? Will I have Group Classes or One on One Training?

REAL ESTATE TRAINING:

- ____Life of An Escrow (All the Steps A-Z in Order)
- ____How to Write a Purchase Offer
- ____How to Write a Listing Agreement
- ____Filling Out and Understanding Repair Addendums
- ____Filling Out and Understanding Other Common Addendums
- ____Types of Loans and Some Info About Each One
- ____Reading and Understanding a Pre-lim
- ____What to Do with Earnest Money and What's the Customary Amount in Your Area
- ____Who Opens Escrow (buyer or seller) And Who Chooses Escrow (buyer or seller)
- ____Safety Protocols and Tips
- ____What to Say and Not Say to Clients, Leads and Other Agents
- ____CMA's -How to Value Property and Create an Accurate CMA
- ____Company CMA Tools -Format and Possible Software
- ____Company Marketing for Your Listings -Listing Presentation Tools
- ____How to Perform Effective and Safe Open Houses
- ____REO's
- ____Short Sales